

Utah State Tax Commission
Renter Refund Application
 (Circuit Breaker Application)

2002
TC-40CB
 Rev. 12/01

For more information or for a listing of other agencies to contact, see the bottom of the reverse side of this form.

Renters: File this application with the Utah State Tax Commission by **December 31, 2002.**

Mobile Homeowners Applying For Lot Rental Refund: If members in the household as of January 1, 2002 are the same as members in the household as of January 1, 2001, use form TC-40CY, or your county's property tax relief form. A "household" is an association of all people living in the same dwelling sharing furnishings, facilities, accommodations and expenses.

Applicant's Name If more than one person lives in a household, only one person can file an application.

Applicant's Last Name	Applicant's First Name	Middle Initial	Birth Date	Social Security Number
Spouse's Last Name (if spouse is living)	Spouse's First Name	Middle Initial	Birth Date	Social Security Number
Address	City	County	State	ZIP Code
			Daytime Telephone Number	

Do You Qualify For A Refund?

APPLICANT must answer questions 1 through 5.

1. Were you age 65 or older before **December 31, 2001**, **OR** are you a widow or widower? Enter spouse's date of death: _____. Attach a copy of your deceased spouse's death certificate if this is the first year you are claiming a refund as a widow or widower. ☐ Yes (Go on to question 2) ☐ No (STOP, you do NOT qualify)

2. **2001 Household Income** (from **all** household members living in the household as of Jan. 1, 2001).

Taxable Income

A. Wages/salaries	A	
B. Pensions/annuities	B	
C. Interest/dividends/trusts	C	
D. Alimony/other income	D	

Non-taxable Income

E. Social Security/other government programs	E	
F. Capital gains/pensions/annuities	F	
G. Interest/dividends/trust income	G	
H. Loss carryforwards/rental depreciation	H	
I. Total 2001 household income from all sources (add lines A through H)	I	

Total members in household as of Jan. 1, 2001 _____

You **do not** qualify if the amount in Box "I" exceeds \$23,879.

Is the amount in Box "I" above **less than or equal to \$23,879**? Household Income is income received during 2001 by all members of a household (not just the applicant) living in the same dwelling, sharing furnishings, facilities, accommodations and expenses as of Jan. 1, 2001. ☐ Yes (Go on to question 3) ☐ No (STOP, you do NOT qualify)

3. Did you furnish your own financial support for 2001? If you are claimed as a dependent on someone's tax return, you did not furnish your own financial support and do not qualify. ☐ Yes (Go on to question 4) ☐ No (STOP, you do NOT qualify)

4. Did you live in Utah for the entire year of 2001? You must have lived in Utah for the entire calendar year to be eligible. ☐ Yes (Go on to question 5) ☐ No (STOP, you do NOT qualify)

5. Are you a mobile homeowner applying for a lot rental refund? ☐ Yes (Go on to next page) ☐ No (Go on to next page)

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This Box for Tax Commission Use Only

Section One - Rent Information

Complete this section for each place you rented **during 2001**. If you received rental assistance, you can only claim the portion of rent you paid.

Address of apartment or mobile/home lot (include apartment or lot number)	Name and telephone number of landlord or manager	Date rented in 2001 from - to	Total months	Monthly rent you paid	Total rent you paid
		Utilities included in rent? None <input type="checkbox"/> Gas <input type="checkbox"/> Electric <input type="checkbox"/>			
		Utilities included in rent? None <input type="checkbox"/> Gas <input type="checkbox"/> Electric <input type="checkbox"/>			
		Utilities included in rent? None <input type="checkbox"/> Gas <input type="checkbox"/> Electric <input type="checkbox"/>			
		Utilities included in rent? None <input type="checkbox"/> Gas <input type="checkbox"/> Electric <input type="checkbox"/>			

Total rent you paid in 2001 (This amount should not include the cost of utilities)

Section Two - Certification and Signature Certify, sign and date.

Under penalties of perjury, I declare to the best of my knowledge and understanding, this information is true, correct and complete.

Signature of applicant X	Date	Signature of spouse X	Date
Preparer's name and address or organization (if not applicant)			Preparer's telephone number

Return this application to Taxpayer Services Division, Utah State Tax Commission, 210 N 1950 W, SLC, UT 84134-0800

Renter Refund Schedule			
2001 Household Income Limits		Renter Refund % of rent	Maximum Renter Refund
Lower	Upper		
\$0	\$8,118	9.5%	\$637
\$8,119	\$10,825	8.5%	\$556
\$10,826	\$13,530	7.0%	\$477
\$13,531	\$16,236	5.5%	\$357
\$16,237	\$18,944	4.0%	\$278
\$18,945	\$21,490	3.0%	\$159
\$21,491	\$23,879	2.5%	\$78

For More Information Contact:

Golden Years Center (Bountiful) 295-3479 or 297-3470
 Salt Lake County Division of Aging 468-2480
 Heritage Center (Clearfield) 773-7065
 Davis County Council on Aging 451-3377
 Autumn Glows Center (Kaysville) 544-1235 or 544-1250
 Utah State Tax Commission 297-2200 or outside Salt Lake area, 1-800-662-4335 or on the web at www.tax.utah.gov